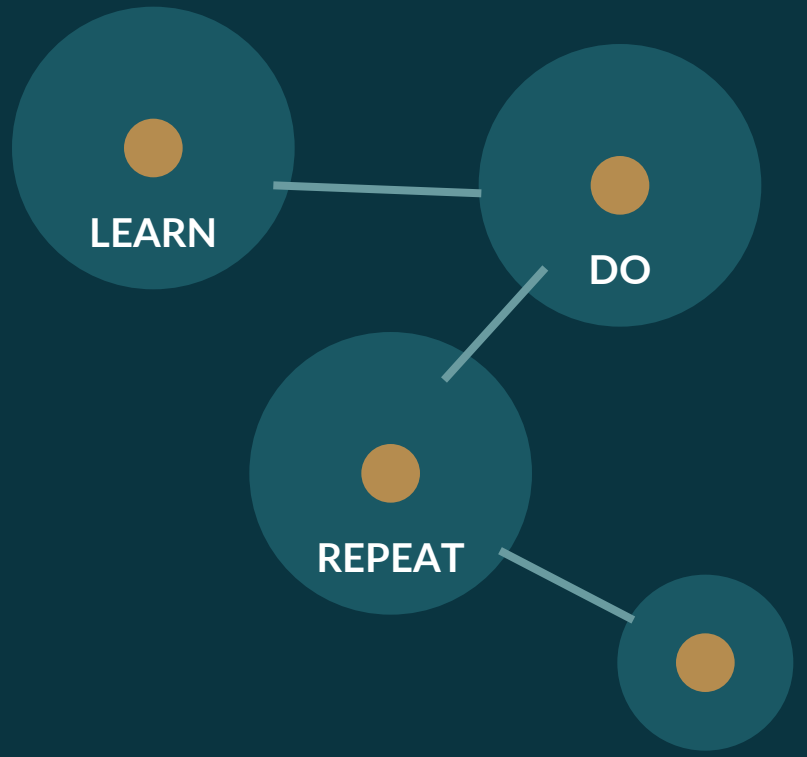
SELECTED PROFESSIONAL WORK SAMPLES

Technology training, made usable.

Instructional design / CRM workflow learning / Onboarding / Change enablement

HOW I APPROACH LEARNING

1. **Understand the work**
   Identify the task and where performance breaks down.
2. **Make it practical**
   Demonstrate, practice, and provide point-of-work support.
3. **Check adoption**
   Measure whether the workflow is used accurately.



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Original demonstrations. No real client records or employer screenshots.

01 / BACKGROUND

The experience behind the examples

Practical systems training rooted in insurance operations and distributed onboarding.

~3 YEARS

Dynamics 365

Hands-on CRM business use and learner support.

7 TEAMS

Distributed training

Independent teams supported through shared learning resources.

4 TIME ZONES

Virtual delivery

Live facilitation and accessible on-demand learning.

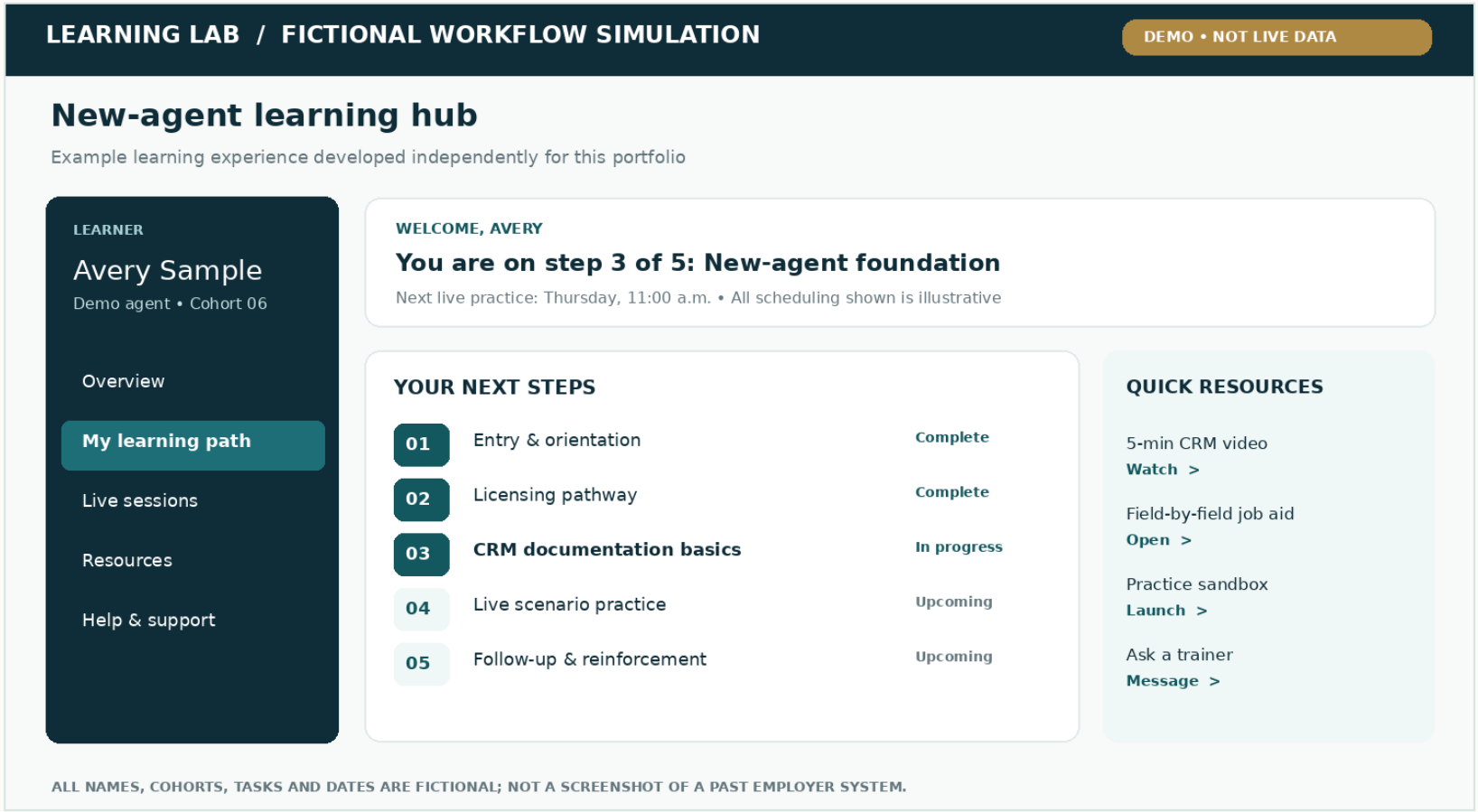
MY TRANSFERABLE STRENGTH

I connect the technical steps employees must take to the business outcome those steps support. My insurance experience is primarily in life insurance and financial services; for benefits-specific workflows, I would validate terminology and procedures with the relevant subject-matter experts.

02 / SAMPLE A

A clear path from entry to readiness

Reconstructed approach to recruiting and new-agent onboarding; dashboard illustration created for this portfolio.



DESIGN PRIORITIES

Visible next step

Reduce the need to guess what comes next.

Flexible access

Provide resources across schedules and time zones.

Human support

Use live sessions for questions and practice.

03 / DESIGN METHOD

From a need to a usable learning experience

An ADDIE-based retrospective of the onboarding approach. This is a framework mapping, not a claim that the historic project carried an ADDIE label.

01 ANALYZE

Identify where candidates or new agents lose the next step.

02 DESIGN

Sequence communications, self-paced resources, and practice.

03 DEVELOP

Create step guides, videos, and facilitator resources.

04 IMPLEMENT

Deliver sessions and enable access across locations.

05 EVALUATE

Check task accuracy, recurring questions, and support needs.

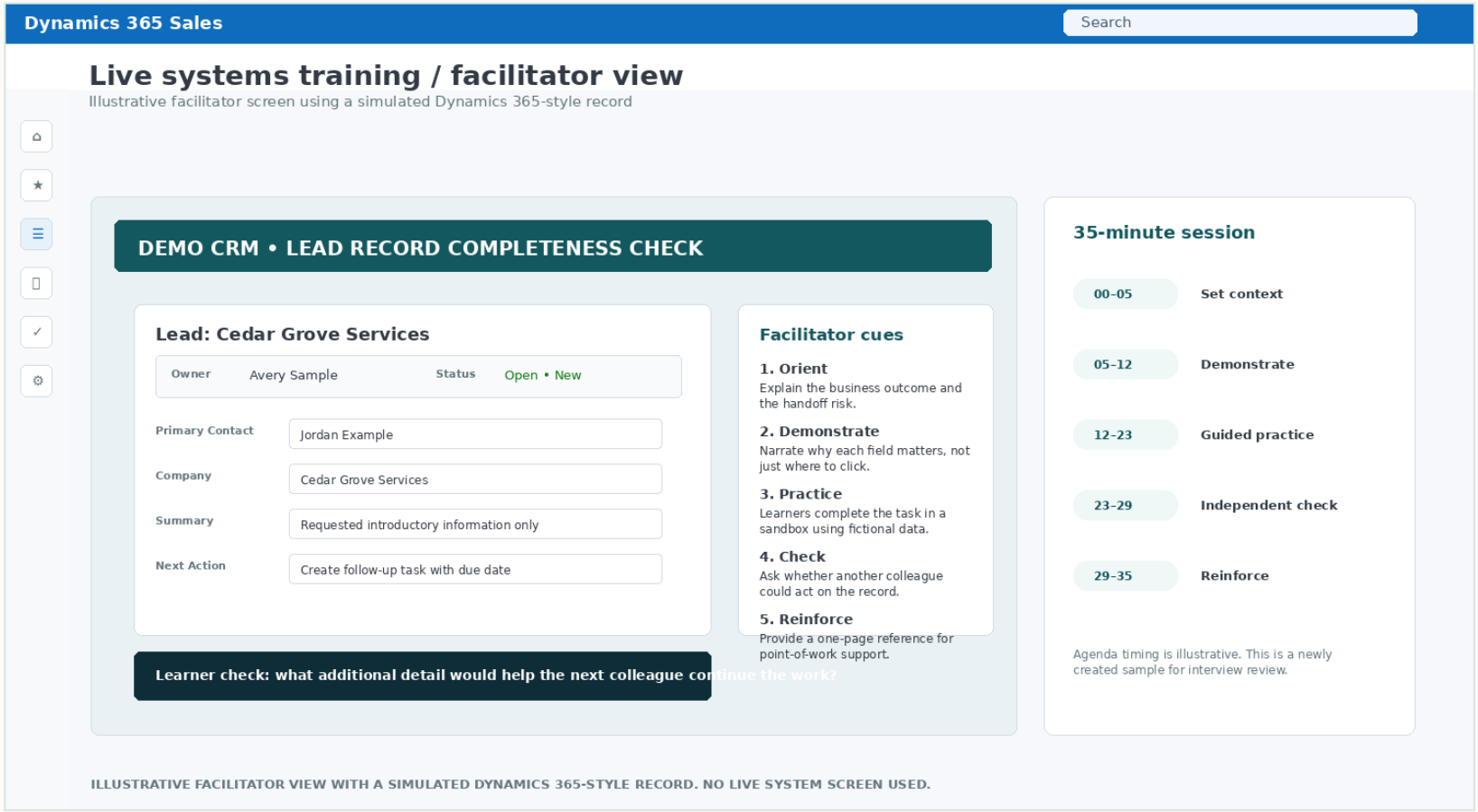
EXAMPLE OF AN OBSERVABLE LEARNING OBJECTIVE

Given a fictional onboarding scenario, the learner locates the next approved resource, identifies the required action, and knows how to seek help if blocked.

04 / SAMPLE B

Teach it. Practice it. Reinforce it.

An original model of a task-based virtual session informed by my live training and asynchronous support experience.



35-MINUTE SESSION

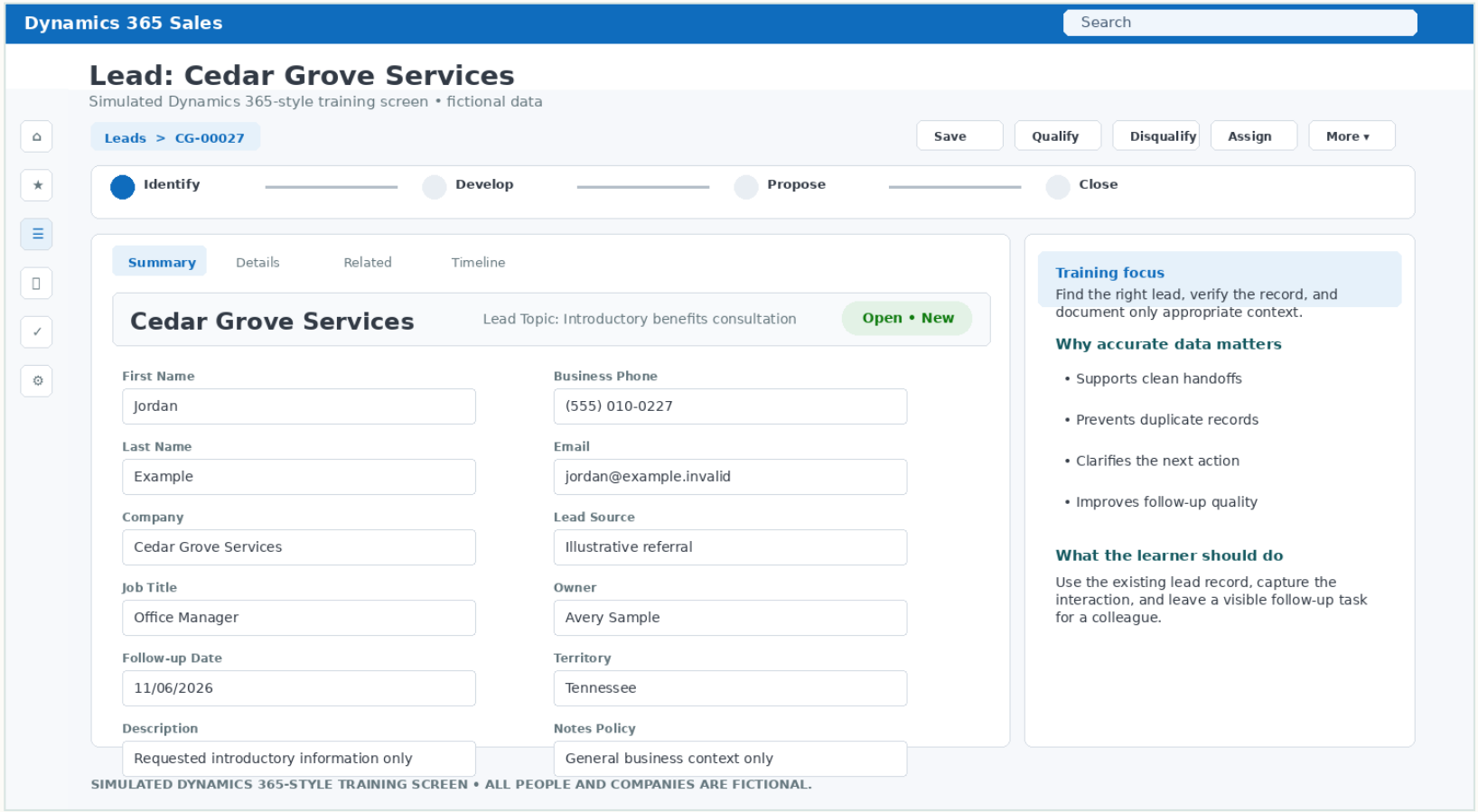
00–05	Set context
05–12	Demonstrate
12–23	Guided practice
23–29	Independent check
29–35	Reinforce

Timing is illustrative, not a historic agenda.

05 / SAMPLE C

A lead record someone can trust

Original CRM training simulation using fictional contact details and generalized Dynamics 365 Sales concepts.



LEARNER OUTCOME

Find an existing lead, confirm the appropriate record, and record only approved business information.

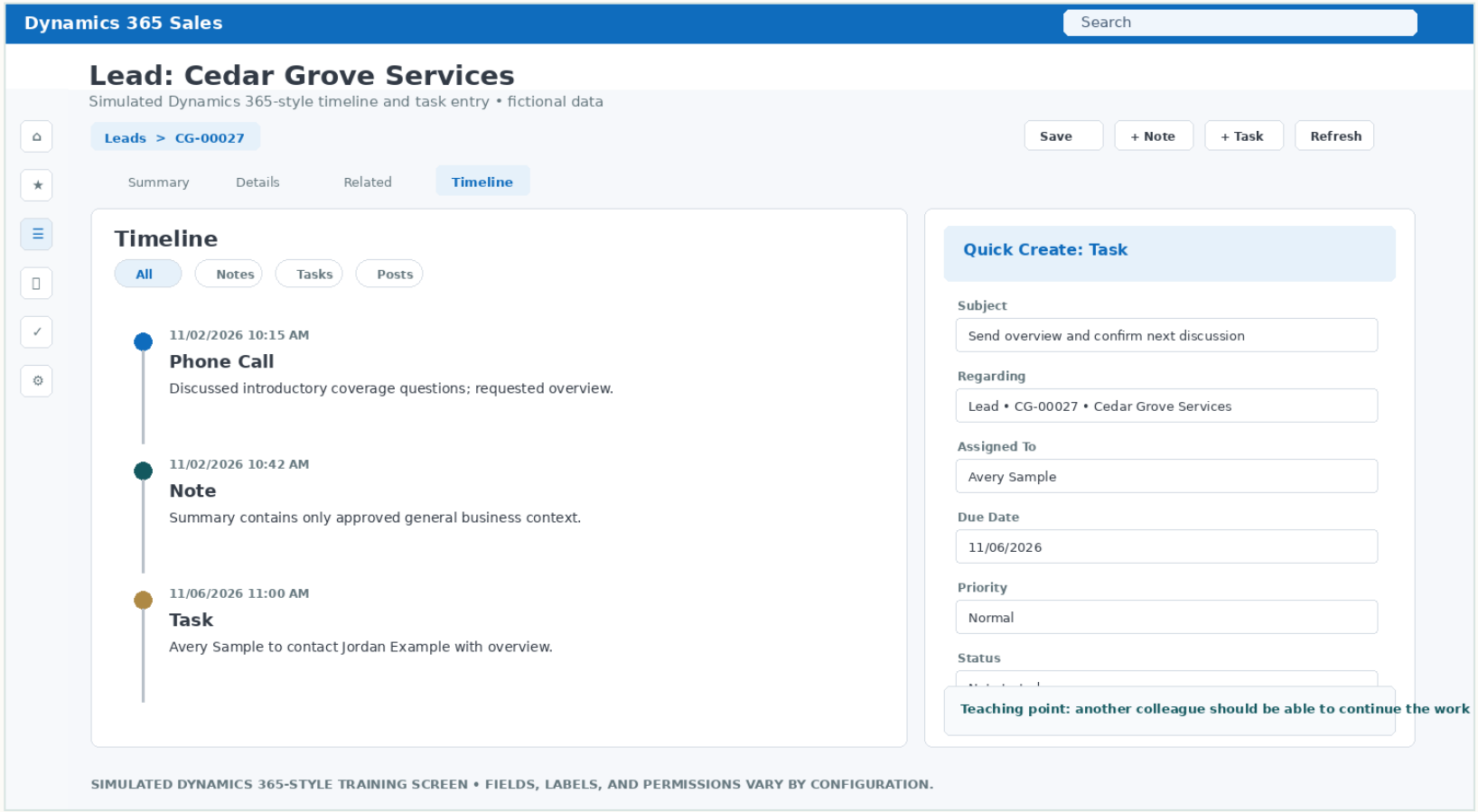
WHY IT MATTERS

Fewer duplicate records, clearer context for colleagues, and better quality follow-up.

06 / SAMPLE C CONTINUED

A follow-up that survives a handoff

The learner demonstrates that the next colleague can tell what happened, what comes next, and who owns it.



TEACHING POINT

Documentation is a team workflow, not just data entry.

CHECK FOR

- Relevant, permitted notes
- Assigned next action
- A clear due date
- No unnecessary sensitive data

07 / USABLE RESOURCE

One-page learner job aid: the clean handoff

A practical example of point-of-work support; the sequence is conceptual, not a guaranteed click path.

01	FIND	Check for an existing lead before creating a record.	Avoid duplicate data.
02	VERIFY	Confirm authorized contact and organization details.	Support accurate communication.
03	DOCUMENT	Summarize the interaction using appropriate detail.	Preserve useful context.
04	ASSIGN	Create an owned follow-up task with timing.	Make the next action visible.
05	REVIEW	Confirm quality and permitted access before exiting.	Protect the record and handoff.

30-SECOND PROFICIENCY CHECK

Can a colleague identify the contact, understand the interaction, and act on the assigned next step without asking the original agent?

08 / ADOPTION

The human side of a new CRM process

ADKAR-inspired rollout support for a hypothetical system or workflow change.

A	**AWARENESS** Why does this change matter?	Show the handoff or quality problem being solved.
D	**DESIRE** Why participate?	Listen to resistance; connect benefits to each role.
K	**KNOWLEDGE** What do I need to know?	Give role-specific demos and quick references.
A	**ABILITY** Can I do the work?	Offer practice in a safe training environment.
R	**REINFORCEMENT** Will it stick?	Check errors, coach managers, and update resources.

Training is not always the answer.

If the real barrier is unclear ownership, a system defect, or process friction, investigate it with the system owner rather than simply reteaching.

09 / EVALUATION

Measure the work, not just attendance

Illustrative proficiency and adoption measures for the fictional Cedar Grove workflow—not historical performance results.

KNOW

Explain the approved note and follow-up expectations.

Short knowledge check

DO

Complete the practice task without prompts.

Observed skill demonstration

TRANSFER

Use accurate record and follow-up practices on the job.

Approved quality indicators

IMPROVE

Detect repeat questions or persistent workflow friction.

Feedback + remediation loop

Any measure would be established with the business owner, using approved data and a defined baseline.

10 / ROLE-BASED ENABLEMENT

Adapt the learning to the job being done

Illustrative role-based design for an insurance organization; actual processes require verification with relevant subject-matter experts.

PRODUCER

Build accurate activity and opportunity context.

ACCOUNT TEAM

Maintain continuity and reliable client handoffs.

OPERATIONS

Understand data quality and process exceptions.

LEADER

Reinforce adoption and review appropriate indicators.

Working model: confirm approved workflows → validate with system owners and SMEs → design and test learning → release with reinforcement.

SELECTED WORK SAMPLES

Let’s make technology easier to use.

A training experience should help people work confidently and consistently—not just finish a course.

THE THROUGH-LINE

Clarity for the learner. Accuracy for the business. Reinforcement for lasting adoption.

Practical demonstrations • Training design • Change support

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ABOUT THESE SAMPLES

Prepared independently for public portfolio review. Onboarding examples reconstruct past experience at a high level; training screens, fictional records, lesson plans, and adoption scenarios are newly authored demonstrations. No proprietary employer materials or real client or agent data were used.